



Job Aid:

How to Create a Grant Posting from Scratch in COMMBUYS

This Job Aid shows how to:

- Create a Grant from Scratch in COMMBUYS

Of Special Note:

All state agencies are subject to 815 CMR 2.00, State Grants, Federal Grant Awards, Federal Sub-grants and Subsidies as well as the [Office of the Comptroller's policy on State Grants, Federal Sub-Grants and Subsidies](#). Departments must use COMMBUYS to publicly post the availability of a discretionary Grant or Grant Program and publish the results of grantee selections. Use of COMMBUYS to receive electronic quotes for grant opportunities is optional; however, state agencies are encouraged to require grantees to register and submit quotes (applications) through COMMBUYS, which provides a central repository for receipt of electronic applications. As more grantees use COMMBUYS to identify grant opportunities, they will have a single location to apply for grants from multiple state agencies, resulting in efficiencies for both the grantees and the state agencies.

Bids (Grants) are documents used to request responses (quotes) from potential Grantees. This job aid will start at the point of creating a new bid for posting Grants, which is a very similar process to posting any other bid document.

Job Aid:

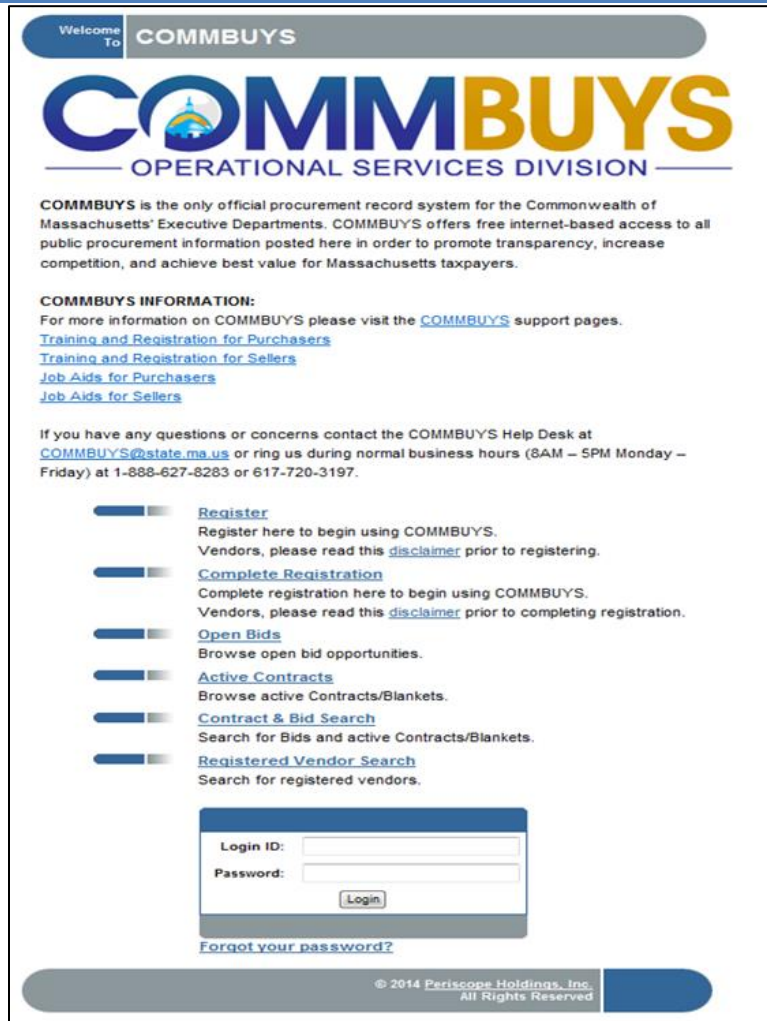
How to Create a Grant Posting from Scratch in COMMBUYS

Screenshot

Directions

Step 1: COMMBUYS Landing Page

1. Launch the COMMBUYS website by entering the URL for [COMMBUYS](https://www.commbuys.com) (<https://www.commbuys.com>) in the browser.
2. Enter your Login ID and password and click the **Login** button on the COMMBUYS landing page.



Welcome To **COMMBUYS**

COMMBUYS
OPERATIONAL SERVICES DIVISION

COMMBUYS is the only official procurement record system for the Commonwealth of Massachusetts' Executive Departments. COMMBUYS offers free internet-based access to all public procurement information posted here in order to promote transparency, increase competition, and achieve best value for Massachusetts taxpayers.

COMMBUYS INFORMATION:
For more information on COMMBUYS please visit the [COMMBUYS](#) support pages.
[Training and Registration for Purchasers](#)
[Training and Registration for Sellers](#)
[Job Aids for Purchasers](#)
[Job Aids for Sellers](#)

If you have any questions or concerns contact the COMMBUYS Help Desk at COMMBUYS@state.ma.us or ring us during normal business hours (8AM – 5PM Monday – Friday) at 1-888-627-8283 or 617-720-3197.

- [Register](#)
Register here to begin using COMMBUYS.
Vendors, please read this [disclaimer](#) prior to registering.
- [Complete Registration](#)
Complete registration here to begin using COMMBUYS.
Vendors, please read this [disclaimer](#) prior to completing registration.
- [Open Bids](#)
Browse open bid opportunities.
- [Active Contracts](#)
Browse active Contracts/Blankets.
- [Contract & Bid Search](#)
Search for Bids and active Contracts/Blankets.
- [Registered Vendor Search](#)
Search for registered vendors.

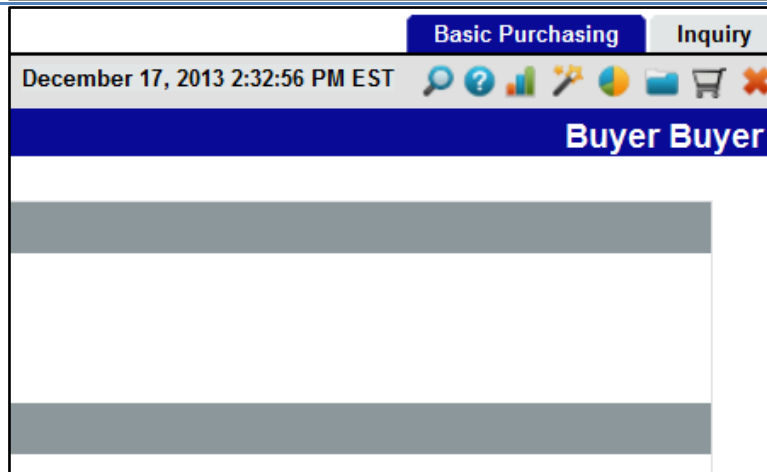
Login ID:
 Password:

[Forgot your password?](#)

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Step 2: Selecting role in COMMBUYS

Upon successful login, select the **Basic Purchasing** role on the upper right side of the page.



December 17, 2013 2:32:56 PM EST

Basic Purchasing **Inquiry**

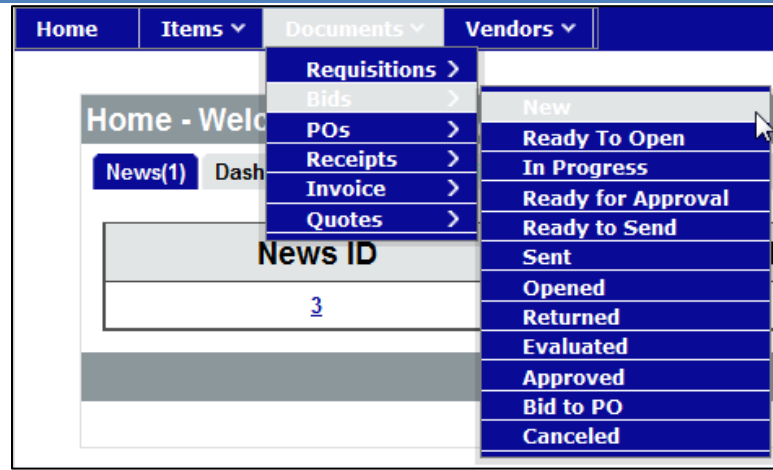
Buyer Buyer

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Step 3: Start a new Bid Document

From the Navigation Bar, select:
Documents > Bids > New



Step 4: Select method to create New Bid

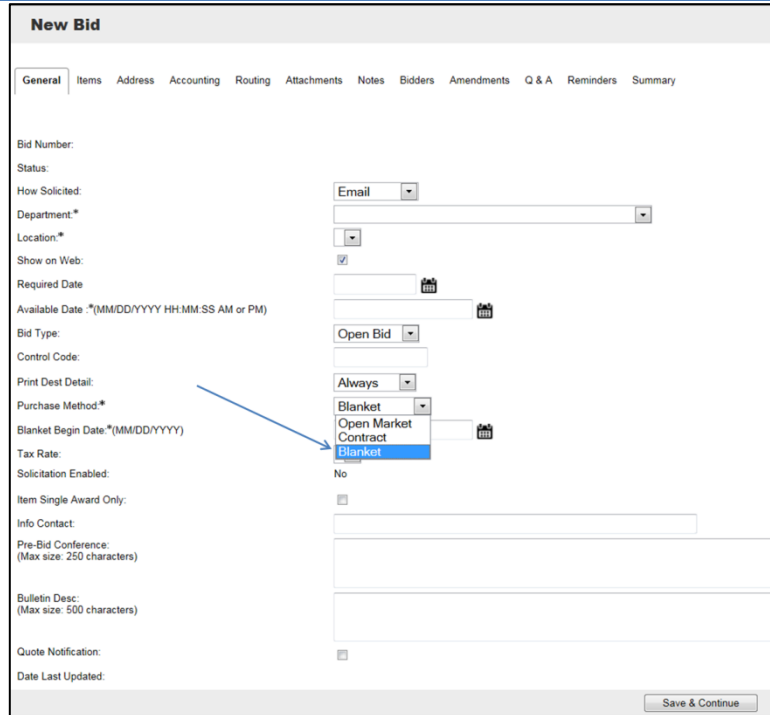
1. Select the **Create a bid from scratch** radio button.
2. Click the **Continue** button.

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Step 5a: Left half of General Tab on a Bid

This is the left half of the Bid General tab where you select the Bid Opening/Closing date and contract dates (if applicable). COMMBUYS generates a BID number after you save your information on the General tab.

Optional fields:

- Select How Solicited from dropdown:

Email (default), Fax or Telephone

If not automatically populated, select from dropdowns:

- Your **Department**
- Your **Location**
- Show on Web:** This should be checked for Grants to ensure the bid displays and is searchable in COMMBUYS without having to login
- Service or Commodity **Required Date**
- Available Date:** The date a Grantee is able to open and download the Grant application and other documents. Grantees can also begin to enter online responses at this time. For Best Value Grant Notices of Intent to Award, the date would be the date of the Notice.
- Bid Type.** Select open or closed. Only select closed if all Grantee(s) are registered in COMMBUYS and restricting applicants to a select group of registered vendors. Most Grants will be OPEN
- Purchase Method dropdown:** Select Blanket. Once Blanket is selected, two additional fields requiring input- populate.
- Blanket Begin Date:** The anticipated beginning date of a contract or award. Click the calendar icon to select blanket start date.
- Info Contact.** Input the contact name if it differs from the purchaser.
- Pre-Bid Conference:** 250 character field to capture BID conference information.

NOTE: all fields that list an * are required.

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Step 5b: Right half of the General tab on a Bid

This is the right half of the Bid General tab. The

- **Bid Description:** Must include title of the Grant (the word "Grant" must be included in title) and any other identifiable number. (Limit 160 characters). This is the key searchable field to locate the Grant and the key identifier for tracking within COMMBUYS.
- **Purchaser:** Defaults to designated purchaser.
- **Type Code dropdown** determines master blanket type.
- Select **Type Code NS**, Non-Statewide Solicitation only.
Allow Electronic Response: Check if **Mandatory fields for Blanket:** the Grantees are submitting their applications as electronic quotes within COMMBUYS. If there is an alternate application submission method, uncheck this box. For Best Value Grant Notices of Intent to Award, this box would be unchecked.
- **Bid Opening Date:** The date selected on the Bid (Grant) when the response period is closed to the respondent. COMMBUYS will no longer accept quotes for that Bid and the Grantor is able to open and view quotes. For Best Value Grant Notices of Intent to Award, the date would be the final date for any challenges to be filed related to the Notice.
- **NOTE: DO NOT USE Purge Date.**
- **Informal Bid:** If selected, Commonwealth users can see the submitted Grantee quotes before bid opening date (Grant Response Deadline).
- **Blanket End Dates:** Enter the anticipated contract or award end dates using the calendar icon.
- Click the **Save & Continue** button when finished.

Description:*

Purchaser:*

Type Code:

Fiscal Year:*

Organization:

Allow Electronic Response: ☒

Bid Opening Date:*(MM/DD/YYYY HH:MM:SS AM or PM)

Purge Date:(MM/DD/YYYY)

Informal Bid: ☐

Estimated Cost: \$0.00

Alternate ID:

Catalog Id:

Blanket End Date:*(MM/DD/YYYY)

Print Format:*

Enable Rolling Enrollment: ☐

Enable Open Enrollment: ☐

User Last Updated:

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Step 6: General validation errors

COMMBUYS assigns a Bid number and generates General Validation Errors (in **Red**) of 'No Items'. Click the **Items** tab to remove the error message and to add items to the bid.

Step 7: Add Items to the Bid

Click the **Add Items** Button to add item or services to the Bid.

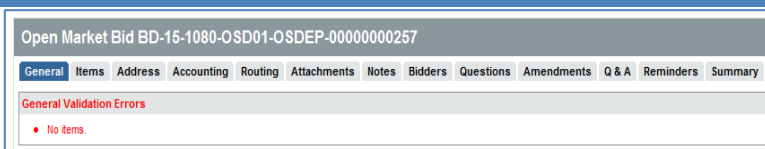
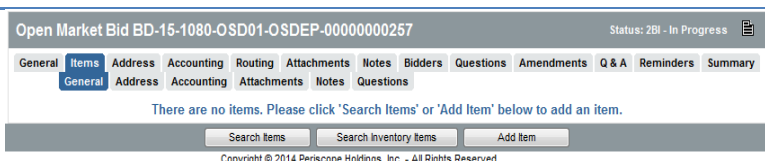
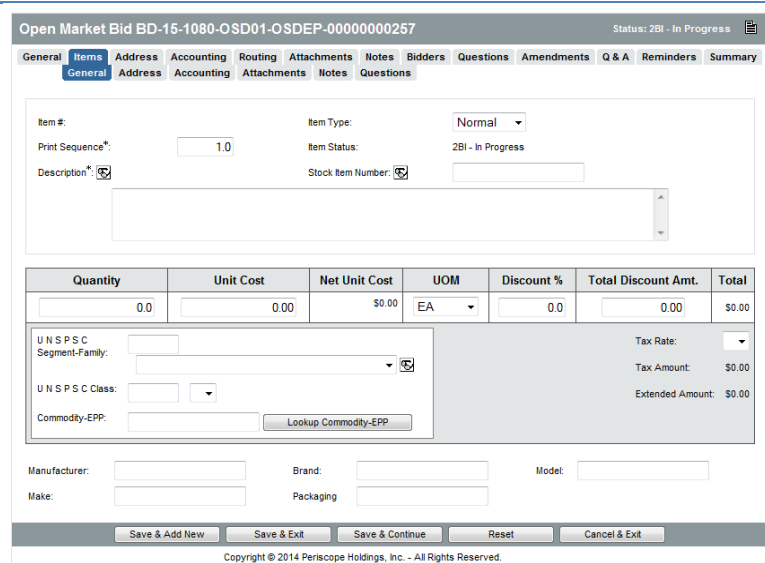
Step 8: Item selection Page

Input the item or service information. Major fields on this page include:

- **Print Sequence*** – Value defaults.
- **Description*** – Enter complete description of Grant, eligibility or Best Value Notice of Intent to Award.
- **Quantity** – Enter quantity (must be at least 1). If Grant is for a specific number, enter that quantity. If unknown, enter 1 (which will be used most often for Grants).
- **Unit Cost** – Enter cost, if known. (leave \$0 if unknown)
- **UNSPSC** – Set of codes that classify goods and services into standardized groups.
 - Segment/Family
 - Class

NEW UNSPSC Grant Opportunity Code – code number created within COMMBUYS for the Commonwealth of Massachusetts to codify a grant as opposed to a commodity is 000000. All Grants can be found under this code and it should be used in addition to other codes you choose to identify the required service.

Other Product Information – These fields are optional.

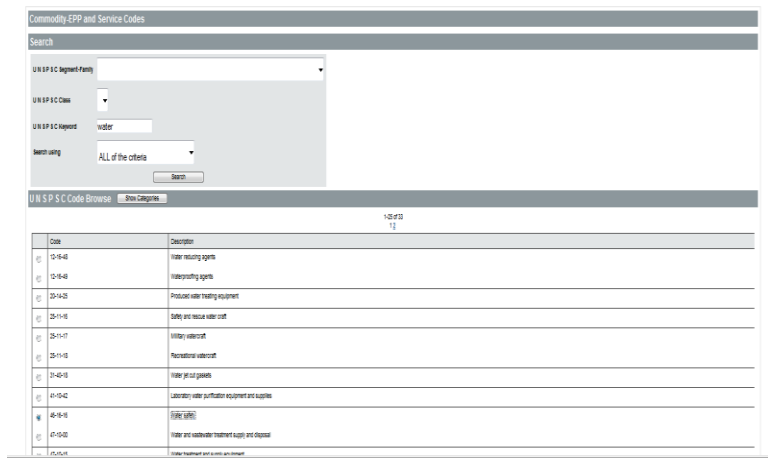




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Code	Description
15-15-40	Water treating agents
15-15-40	Water treating agents
15-15-40	Produced water treating equipment
15-15-40	Safety and rescue water craft
15-15-40	Utility watercraft
15-15-40	Operational watercraft
15-15-40	Water jet cutters
15-15-40	Laboratory water purification equipment and supplies
15-15-40	Water jet cutters
15-15-40	Water and wastewater treatment supply and disposal
15-15-40	Water treatment and control equipment

Step 9: Commodity Service Codes Page

After clicking the eyeglass icon, the Search Code screen populates.

Use the available search dropdowns and fields to find the best code.

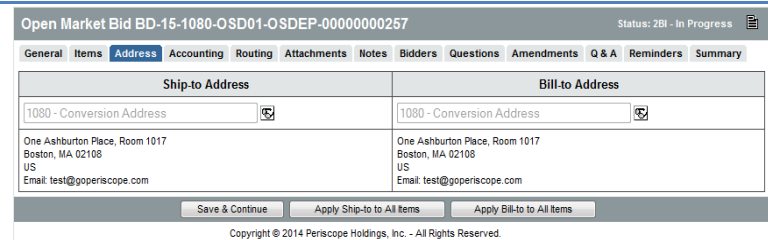
- Select the radio button on the left side of the screen to choose the best code(s), and click **Save & Exit** to return to the Items tab. Add as many items as required for the Bid by clicking **Save & Add New**.
- Remember the **GRANT** Code to signify a grant as opposed to a commodity is 000000. All Grants can be found under this code and it should be used in addition to other codes searched for and chosen to identify the required service.
- Click the **Save & Exit** button once finished with all required bid items and the **Items General** tab redisplay.

Click the **Address** tab to continue once all items are added.

Step 10: Address Tab

- Click the **Address** tab to continue the bid.
- Review the Ship-to and Bill-to Addresses.
- Click the **Eyeglass** icon to add or change either address.

Note: Organization Administrators (OA) maintains the Ship-to and Bill-to addresses. To update or add additional addresses, contact the OA.



Ship-to Address	Bill-to Address
1080 - Conversion Address	1080 - Conversion Address
One Ashburton Place, Room 1017 Boston, MA 02108 US Email: test@goperscope.com	One Ashburton Place, Room 1017 Boston, MA 02108 US Email: test@goperscope.com

Save & Continue Apply Ship-to to All Items Apply Bill-to to All Items

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Lookup Ship-to Address - Open Market Bid BD-15-1080-OSD01-OSDEP-00000000257

Search Using: ALL of the criteria

Search Fields:

Department ID		Department Name	
Department Suffix ID		Department Suffix Name	
Location ID		Location Name	
City		County	

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Find It Clear

Close Window

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Step 11: The Lookup Ship-to Address window displays.

- Input the search criteria and click **Find It**.
- If no criterion is entered, all possible addresses for the Organization will appear by clicking **Find It**.

Step 12: Lookup Ship-to Address search results display.

Check the **Select** radio button adjacent to the address you would like to select. Click the **Select** button at the bottom of the page

Select	Department ID	Department Name	Department Suffix ID	Department Suffix Name	Address Info
<input checked="" type="radio"/>	00100	PETS PLUS	100	10055	Anne Bell One Congress Street 11th floor Boston, MA 02114 US Email: linda.banks-grant@accenture.com Phone: (617)959-9999

Select Close Window

Step 13: Ship to Address populates

The search page closes and the selected address populates the Ship-to Address.

Click **Save & Continue**.

Open Market Bid 00000102

General Items **Address** Accounting Routing Attachments(1) Notes Bidders Questions Amendments Q & A Reminders Summary

Ship-to Address	Bill-to Address
100 - 10055	WSH1 - Central Warehouse
Anne Bell One Congress Street 11th floor Boston, MA 02114 US Email: linda.banks-grant@accenture.com Phone: (617)959-9999	Inventory User 211 E. 7th Street Suite 1100 211 E. 7th Street Austin, TX 78701 US Email: gforen@periscopeholdings.com Phone: (512)868-9400

Save & Continue Apply Ship-to to All Items Apply Bill-to to All Items

Step 14: The Attachments tab displays

Click the **Attachments** tab. The Attachments tab displays. Attachments include Grant Application and Required Forms/Contract Documents.

For **Best Value Notice of Intent to Award**, the Notice and any supporting information should be posted as Attachments.

Click the **Add File** button to add a new file.

Note: Add Form is not currently a working function in COMMBUYS.

Open Market Bid BD-15-1080-OSD01-OSDEP-00000000257

Status: 2BI - In Progress

General Items **Address** Accounting Routing **Attachments** Notes Bidders Questions Amendments Q & A Reminders Summary

Files

Click Add File to add file attachments.

No File Attachments

Forms

Click Add Form to add form attachments.

No Form Attachments

Add File Add Form

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Add File

Name is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters.

Name*:

Description:

File*:

Location:

Step15: Add File window

The Add File window opens. Complete the following fields:

- **Name** – Enter file name (Will auto populate if left blank.)
- **Description** – optional
- Click **Browse** to select a file.
- Click **Save & Continue** to add another file or click **Save & Exit** when all files have been added.

Open Market Bid BD-15-1080-OSD01-OSDEP-00000000257 Status: 2BI - In Progress

General Items Address Accounting Routing **Attachments(1)** Notes Bidders Questions Amendments Q & A Reminders Summary

Files

Name	Description	Show Vendor	Attached By	Attached Date	Delete
Tulips.jpg	Test	<input checked="" type="checkbox"/>	Buyer Buyer	08/21/2014	<input type="button" value="X"/>

Forms

Click Add Form to add form attachments.

No Form Attachments

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Step 16: Attachments tab

The Attachments tab redisplayes with the new file attached.

Open Market Bid 00000102

General Items Address Accounting Routing Attachments(2) **Notes** Bidders Questions Amendments Q & A Reminders Summary

Delete	Note Date	User	Note
<input type="checkbox"/>			Sample Note.

Step 17:

- Click the **Notes** tab (this is an optional tab).
- Add any text or note in the Note box. Notes are viewable only by Commonwealth users. Vendors cannot access or view these notes.
- When complete, click **Save & Continue**

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Open Market Bid 00000190 Status: JB - In Progress

General Items Address Accounting Routing Attachments(1) Notes(1) **Bidders** Questions Amendments Q & A Reminders Summary

General Subcontractors Quote Activity

Vendor Validation Warnings

- No bid holder

Select bidder participation, open or closed, and select vendors to notify

☐ Unrestricted bid, all vendors can view and respond

☐ Restricted bid, only selected vendors can view and respond

Vendor ID	Vendor Name	Vendor Address	Preferred Delivery Method

☐ Show Unit Prices to Vendors

☒ Hide Bid Holder List on Vendor Side

Before you look up bid vendors or add a new vendor, please save your unsaved changes. Otherwise you will lose those changes.

Save & Continue Lookup & Add Vendors

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Step 18: Bidders tab

- Click the **Bidders** tab. In general, a bid (RFR) should be open to all.(Unrestricted)

Several options can be set on the Bidders tab:

- Select bidder participation**
- Unrestricted** – Any vendor can respond to the bid. (For Grants select Unrestricted.)
- Restricted** – Only listed vendors can respond to the bid. Should only be used for Grants when all eligible Grantees are confirmed as registered vendors in COMMBUYS.
- Show the Unit Price to Vendors** – When unchecked (default) bidders cannot see the unit price for bid items.
- Hide Bid Holder List on Vendor Side.** When checked (default), bidders cannot see who has responded to the bid.
- Click **Save & Continue**.
- Click **Lookup & Add Vendors**.

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Lookup & Add Reference Vendors - Bid BD-15-1080-OSD01-OSDEP-00000000257

Search Using: ALL of the criteria

Find It Clear

Search Fields:

Vendor ID Vendor Name

Vendor Tax ID Vendor Legal Name

Show ☐

Vendor Keyword Alternate ID

ZIP Code County

State

☐ Emergency Suppliers ☐ Reference Vendor

UNSPSC Segment-Family

UNSPSC Class

UNSPSC Keyword

DUNS Number

This is the DUNS number assigned to my Business

Environmentally Preferable Product

MBE Certified

Prompt Pay Discount

Are you interested in partnering as a Prime/Sub contractor?

Geographical Service Area in Massachusetts

Service Disabled Veteran Owned Business

SDO Certified

Business Structure

AGREEMENT AND TERMS OF USE FOR SELLERS

Business Type

Women Non-profit Organization (WINPO) Certification

Program ☐ Small Business Purchasing Program

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
0 1 2 3 4 5 6 7 8 9 10

Find It Clear

Find Vendors for All Commodity-EPPs on the Bid Close Window

Step 19: Lookup and Add Reference Vendors screen

Optional. The **Lookup and Add Reference Vendors** screen displays. This should be used to select non-public entities ONLY, if they are eligible to respond to the grant opportunity.

Scroll to bottom of the screen and select **Find Vendors for All Commodity-EPPs on the Bid** button. The results will display with the Vendors who selected the same commodity code as the bid item(s).

COMMBUYS automatically matches the vendors who have correctly registered with the selected UNSPSC codes. These vendors will receive an email notification of the Bid.

Step 20: Dialogue box with Warning Message

A dialogue box displays with a Warning Message when selecting a large number of vendors.


- Click **OK**. The popup window will disappear and all information populates in the bid.
- Click **Save & Exit** to return to the Vendors tab.

Select	Vendor ID	Vendor Name	Alternate ID	Last PO Date	Last Bid Date	Address	City	State	Contact Name	Phone	Reference Vendor
<input type="checkbox"/>	201987	O'Connor & Drew, PC				25 Braintree Hill Park Suite 102	Braintree	MA	David Dilulis	6174711120	No
<input type="checkbox"/>	211456	Revenue Solutions, Inc.				2000 Opportunity Drive Suite 100	Roseville	CA	Jeff Huber	9167808741	No
<input type="checkbox"/>	00000514	The Pams Company, Inc.				PO Box 51501	Boston	MA	Mischa Pams	(781)515-9829	No

Save & Exit Save & Continue Find Vendors for All Commodity-EPPs on the Bid Close Window

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Message from webpage

 Warning: All vendors have been selected for email notification. A large quantity of vendors may take several minutes to process.

OK

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Open Market Bid BD-15-1080-OSD01-OSDEP-00000000257 Status: ZBI - In Progress

General Items Address Accounting Routing Attachments(t) Notes(t) Bidders Questions Amendments Q & A Reminders Summary

Select bidder participation, open or closed, and select vendors to notify

☐ Unrestricted bid, all vendors can view and respond

☐ Restricted bid, only selected vendors can view and respond

Delete	Vendor ID	Vendor Name	Vendor Address	Preferred Delivery Method
<input type="checkbox"/>				
<input type="checkbox"/>	00000051	RR Donnelly	Bid Mailing Address: Add New Address General Mailing Address - Susan Sheridan 400 Blue Hill Drive Su... 400 Blue Hill Drive Suite 100 Westwood, MA 02090 US	Paper Copy Mailed
<input type="checkbox"/>	4503	New England Office Supply (NEOS) (MWBE)	Bid Mailing Address: Add New Address General Mailing Address - Patricia Vacca 135 Lundquist Dr Braintre... 135 Lundquist Dr Braintree, MA 02104 US	Paper Copy Mailed
<input type="checkbox"/>	4951	Muratec America, Inc	Bid Mailing Address: Add New Address General Mailing Address - Jerry Roberts 3301 E. Plano Parkway, Ste... 3301 E. Plano Parkway, Ste #100 Plano, TX 75074	Paper Copy Mailed

☐ Show Unit Prices to Vendors

☒ Hide Bid Holder List on Vendor Side

Before you look up bid vendors or add a new vendor, please save your unsaved changes. Otherwise you will lose those changes.

[Save & Continue](#) [Lookup & Add Vendors](#)

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Step 21: Vendors tab

The Vendors tab will now display all the Vendors who selected the same UNSPSC codes as the Grant.

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General Items Address Accounting Routing Attachments(t) Notes(t) Bidders Questions Amendments Q & A Reminders Summary

Delete	Question #	Print Sequence	Required	Question	Response Type
<input type="checkbox"/>	0	1.0	<input type="checkbox"/>		AVAILABLE

☐ Delete All

[Save & Continue](#) [Reset](#)

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Step 22 Questions Tab

- Click the **Questions** tab. (This is an optional tab.) The Questions tab allows you to create questions for the vendor to answer with a supplied response type.
- You can make these questions a required response by checking the **Required** box.
- To change the **Response Type**, choose from the available dropdown options.
- Once all questions are entered, click **Save & Continue**.

Open Market Bid BD-15-1080-OSD01-OSDEP-00000000257 Status: ZBI - In Progress

General Items Address Accounting Routing Attachments(t) Notes(t) Bidders Questions Amendments Q & A Reminders Summary

Question #	Created Date	User Created	Question Subject	Question	Answer	Show on Web	Show Original Vendor Only	Delete
Add New:						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

☐ Allow vendor to submit questions

☐ Send notification when vendor submitting question

[Save & Continue](#) [Reset](#)

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Step 23 Q&A Tab

Click the **Q&A** tab. This optional tab allows vendors and the Commonwealth to dialog within the bid. This feature is only usable before the bid opening date; however, the questions and answers remain viewable after the bid is opened.

In addition, there are two options on this page:

- **Allow Vendor to submit questions** – Make sure to check if questions are allowed for the bid.
- **Send notification when vendor sends question** – Use if you want notifications of questions sent in COMMBUYS.

Click **Save & Continue** after each question.

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Open Market Bid BD-15-1080-OSD01-OSDEP-00000000257 Status: 2BI - In Progress

General Items Address Accounting Routing Attachments(1) Notes(1) Bidders Questions Amendments Q & A Reminders Summary

Due Date* (MM/DD/YYYY)	Comment* (max 250 characters)	Remind Whom*	Days Prior to Remind*	Date Completed (MM/DD/YYYY)	Send Email	Date Entered	Entered By
			0		<input type="checkbox"/>		

Save & Continue Reset

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Step 24 Reminders Tab

Click the **Reminders** tab. (This is an optional tab.)

To create a reminder, input the information on the **Reminder** tab including:

- Due Date
- Comment
- Remind Whom
- Days Prior to Remind
- Send Email

When the reminder is sent, the tab updates with the Date Completed.

Open Market Bid BD-15-1080-OSD01-OSDEP-00000000257 Status: 2BI - In Progress

General Items Address Accounting Routing Attachments(1) Notes(1) Bidders Questions Amendments Q & A Reminders Summary

Reader Information

Bid Number: 80-19-1080-OSD01-OSDEP-00000000257 Description: Test Status: 2BI - In Progress
Purchaser: Buyer Buyer Minor Status: Now Solicited: Email
Organization: Operational Services Division
Fiscal Year: 16 Department: OSD01 - Operational Services Division Location: OSDEP - Congress B
Show On Web: Yes Allow Electronic Quotes: Yes Required Date: 08/21/2014 09:44:00 AM
Bid Opening Date: 08/20/2014 09:44:00 AM Available Date: 08/21/2014 09:44:00 AM
Purge Date:
Bid Type: Open Bid Informal Bid: No
Control Code: Estimated Cost: \$0.00 Print Best Detail:
Alternate ID: Purchase Method: Open Market Catalog Id (for contract):
Blanket/Contract Begin Date: Blanket/Contract End Date: Type Code:
Info Contact: Bulletin Desc: Pre-Bid Conference:
U N S P S C Code Certified Required: No Acknowledge inclusion required: No Hour of Acknowledge Inclusion: 0:0
Subcontractor Info: Quote Notification: No
Date Last Updated: 08/21/2014 09:45:00 AM User last updated: Buyer Buyer Item Single Award Only: No
Ship-to Address: One Arlington Plaza, Room 1017 Bill-to Address: One Arlington Plaza, Room 1017 Print Format: Bid Print Form
Boston, MA 02108 US Boston, MA 02108 US
Email: test@perscope.com Email: test@perscope.com

Notes: Test
Solicitation Enabled: No
Invoice Method: Three Way Match

Bidders:

Vendor Id	Vendor Name	Preferred Delivery Method	Notifications	Responded
00000001	RR Donnelley	Paper Copy Mailed		No
00001729	The Tree House, Inc.	Paper Copy Mailed		No
00001873	Northern Business Machines, Inc.	Paper Copy Mailed		No
00001906	Greenough Packaging & Maintenance Supplies, Inc.	Paper Copy Mailed		No
00001922	Shawmut Scientific Specialty Systems, Inc.	Paper Copy Mailed		No
00001973	GROUPGLOBAL.NET	Paper Copy Mailed		No
200146	A and A Industrial Supply / ALBECO Fastener, Inc.	Email		No
200260	Canon U.S.A., Inc.	Paper Copy Mailed		No
200262	International Paper	Paper Copy Mailed		No
220109	Rush Americas	Paper Copy Mailed		No
220201	Konica Minolta Business Solutions USA, Inc.	Paper Copy Mailed		No
220236	Encore Images, Inc.	Paper Copy Mailed		No
220251	Sharp Electronics Corp	Paper Copy Mailed		No
220439	J&B Printing LLC	Paper Copy Mailed		No
201142	G A Bianco and Sons, Inc.	Paper Copy Mailed		No
4500	New England Office Supply (NEOS)/HVE	Paper Copy Mailed		No
8001	Murata America, Inc.	Paper Copy Mailed		No

Step 25 Summary Tab – Upper Half

Click the **Summary** tab.

The Summary tab provides a recap of the bid information. Shown here is the upper part of the Summary tab.

Transaction Size (Commonwealth)
Departments Required:

Attachments

Files:
Forms:

Item Information

Item # 1: Test 2BI - In Progress

U N S P S C Code: 44-10-21
Printer and facsimile and photocopier supplies

Qty	Unit Cost	UOM	Total Discount Amt	Tax Rate	Tax Amount	Total Cost
1.0	\$0.00 EA - Each			\$0.00	\$0.00	\$0.00

Manufacturer: Brand: Model:
Make: Packaging:
Account Code: Amount:
There is no item accounting available for this item.

Submit for Approval Cancel Bid Clone Bid Print

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Step 26 Summary Tab – Lower Half

This is the lower part of the Summary tab providing a summary of each item, as well as, the action buttons currently available for the bid:

- Submit for Approval
- Cancel Bid
- Clone Bid
- Print

After reviewing the information, click the **Submit for Approval** button to submit the bid into workflow for approval routing.

Skipped Tabs:

Accounting: Not in use at present.

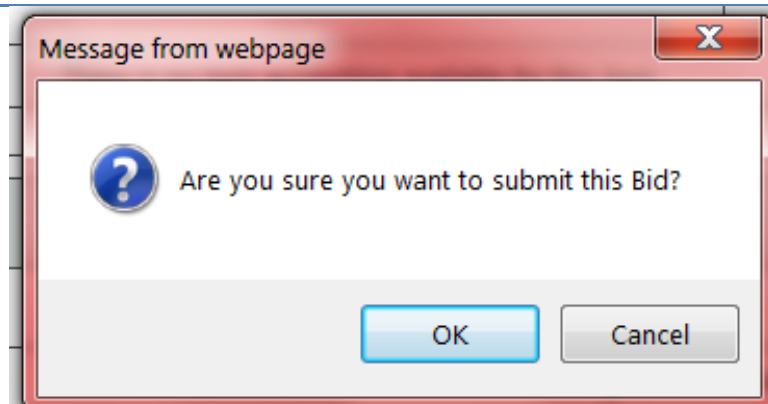
Routing: Populates after submission for approval.

Job Aid:

How to Create a Grant Posting from Scratch in COMMBUYS

Screenshot

Directions

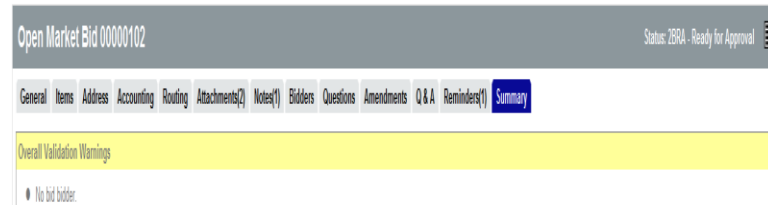


Step 27 Dialogue Box

A Popup message displays stating, 'Are you sure you want to submit this bid?'

Click **OK** to continue with the submission.

To cancel the submission, click **Cancel**.



Step 28 Ready for Approval Status

The Summary tab redisplayes showing a status of Ready for Approval.

Job Aid:

How to Create a Grant Posting from Scratch in COMMBUYS

Screenshot

Directions

Home - Welcome Back Buyer Buyer

News(1) Dashboard Reqs(4) **Bids(39)** PO(3) Approval(7) My Reminders(0) Events(0)
In Progress(0) Ready for Approval(0) **Ready to Send(2)** Ready to Open(36) Opened(1) Approved(0)

Bid #	Organization	Buyer	Description
00000102	Operational Services Division	Buyer Buyer	job aid creation bid
00000055	Operational Services Division	Buyer Buyer	sec test three

Step 29 Control Center

Once the bid is approved, the bid's status will update in your Control Center. The status will change from Ready for Approval to Ready to Send.

Click the blue hyperlink **Bid #** to open the bid.

Pre-bid Approval Path:

Delete	Approver	Order Sequence	Approval Path ID	Level	Approver Type	Date Requested	Date Approved/Disapproved/Ca
	Linda Banks-Grant	1		1	Primary	01/15/2014 05:20:17 PM	01/15/2014 05:23:43 PM

Send Bid Actions

Option(s) ☒ Change bid status to "Sent" and notify vendors ☐ Change bid status to "Sent" only.

Step 30 Summary TAB of Approved Bid

The bid opens to the Summary tab. Scroll to the bottom of the page.

Under Send Bid Actions, Select the appropriate RADIO button option:

- **Change bid status to 'Sent' and notify Vendor** - general rule to send email
- **Change bid status to "Sent" only** – posts the Bid on COMMBUYS, but does not send an email notification to the selected bidders.
- Click on **Send Bid** button. The bid is now posted on COMMBUYS.

Vendors may be able to respond depending on the available date set on the General tab.

NOTE: If changes to this bid are required, follow the **"How to Create a Bid Amendment"** job aid.